# City of Fresno

# PeopleSoft 8.9
# HRMS Query Training Manual

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## Query Overview

A query is a method of retrieving information that is stored in PeopleSoft. All the information about employees, their jobs, their time, and their pay is available to query. Data is stored in various **Records (also called Tables)** in the PeopleSoft database, with **Fields** that hold specific information (e.g. employee id, name, job code, date), and multiple rows that contain unique values for all employees, jobs, reported time, etc. A query will have **Criteria** that limit the results based on your needs.

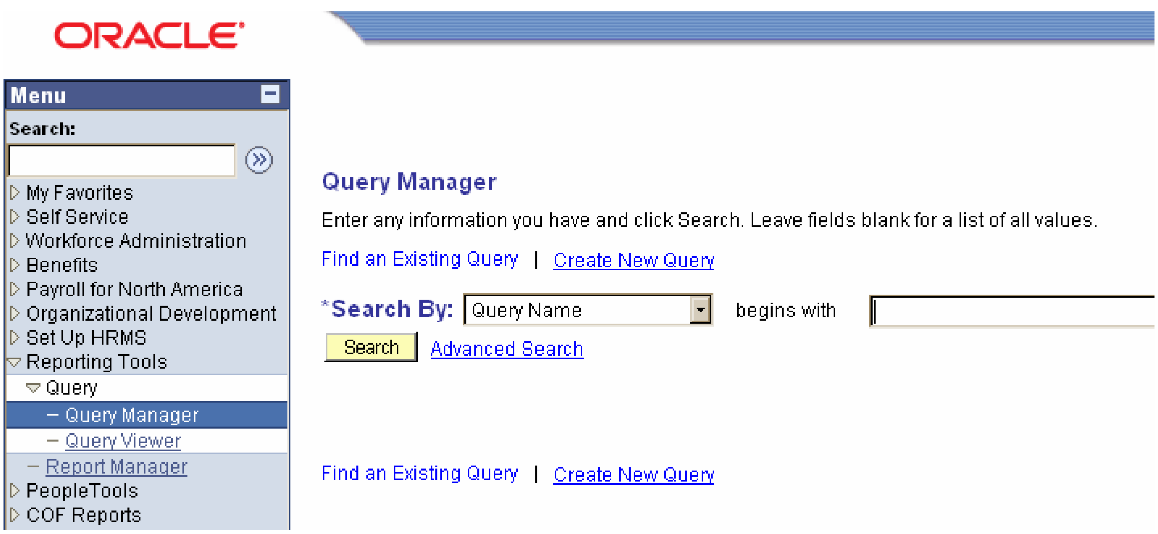
Before you begin a query, you need to know the answers to three questions:

- What do I want to know?
- Where is the information?
- How do I limit the results to only the data I need.

The answers to these questions will tell you what records, fields, and criteria to use.

### Accessing Queries

PeopleSoft queries are created, edited & run from the Query Manager on the Reporting Tools menu. If you are opening an existing query, search by the query name. If you are creating a new query, click the Create New Query link at the bottom. This manual will focus on building new queries. Once built, it is a straightforward process to open an existing query, edit if necessary, and re-run.




### Creating a Query

In order to give you all the necessary tools to create queries, we will walk you through the process of creating a query that shows leave time taken for FMLA for your department or division.

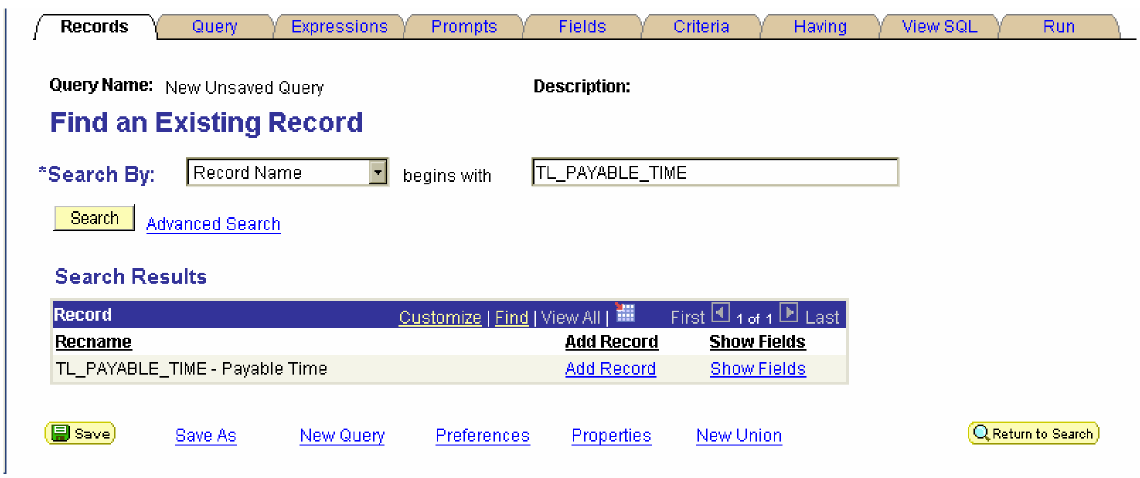
Start by clicking on "Create New Query".

**Where is the information?**

The first step is to select the Records to be used to choose fields for the query. Enter the first few letters of the desired record to refine the desired search:

For this query we need to collect time reporting codes (TRC) and reported hours for all employees in the department/division for the fiscal year. This information can be found in the TL_PAYABLE_TIME record.

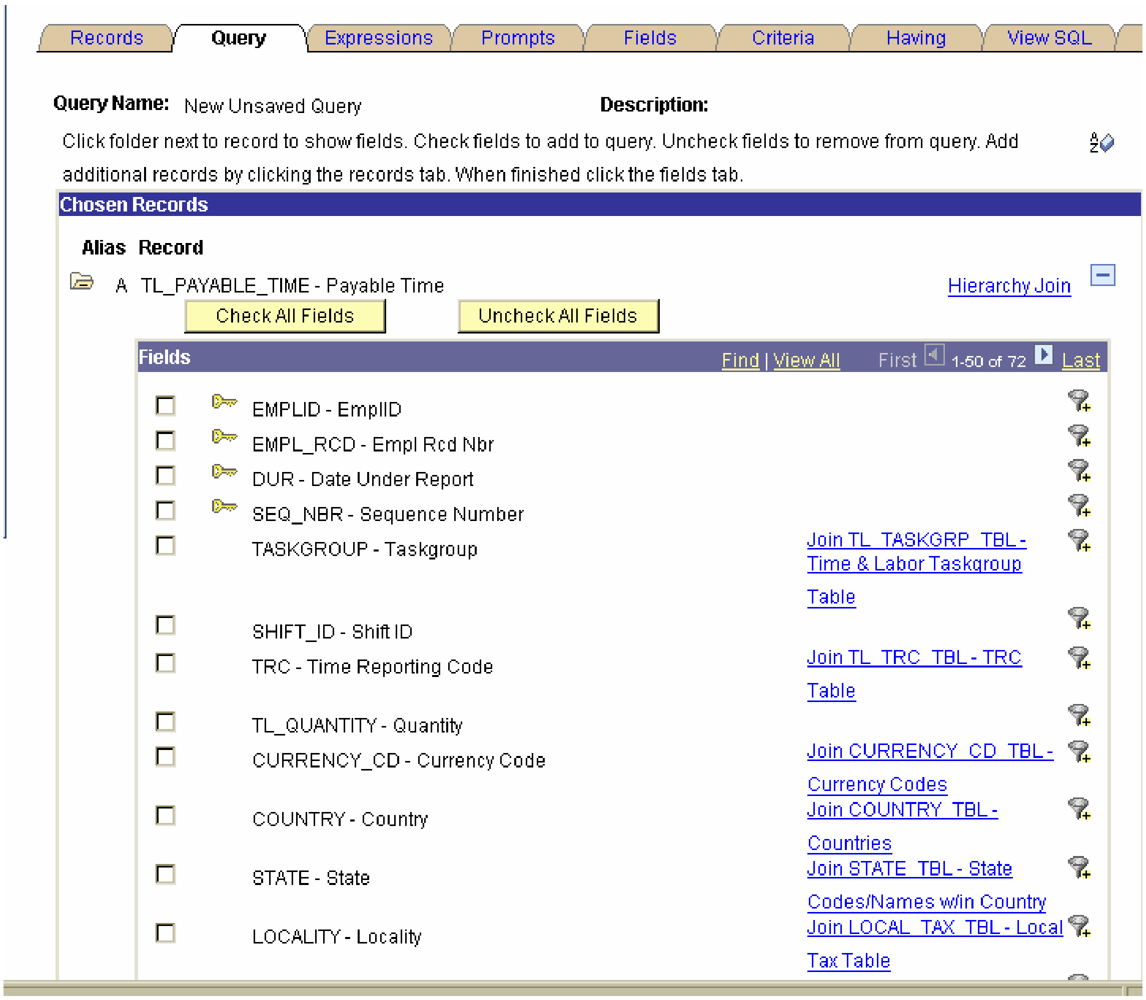

The Lookup displays available records.




If you are not sure what record to use you can click on "Show Fields" and see what choices you will have in this record.

Click on "Add Record" next to TL_PAYABLE_TIME - Payable Time. This will add the record to the query and allow you to select fields to display and use as criteria.

After you have added the record, this page will come up showing all of the fields available to you.




You can select the fields you need by checking the boxes on the left hand side.

For this query we need:

EMPLID – EmplID (Employee ID)
DUR – Date Under Report (shows the dates the TRC was used)
TRC – Time Reporting Code
TL_QUANTITY – Quantity (Number of hours charged to the TRC)

In order to limit results to your Department/Division you will need to add another record to the query. The JOB record has the data we need.

Click on the “Records” tab.

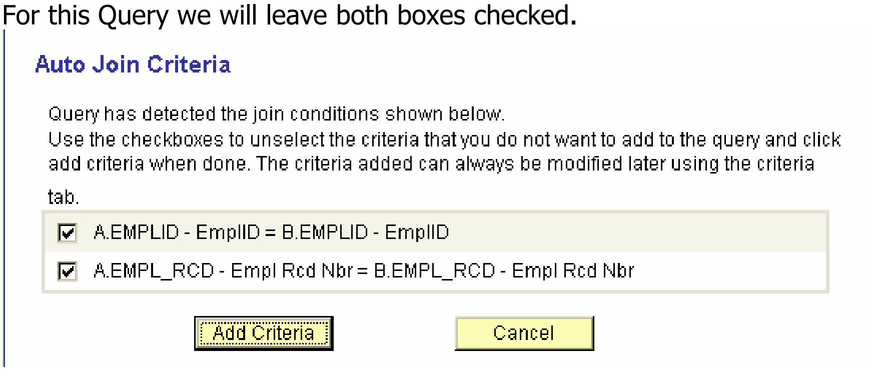
Type JOB in the search box and select “Join Record” next to JOB – EE Job History.


It is important to remember that there must be a key field that is shared by the two records to be joined. For this query both the TL_PAYABLE_TIME and the JOB records have an EmplID field that can be used to link them.

Click on A=TL_PAYABLE_TIME – Payable Time to create the join.

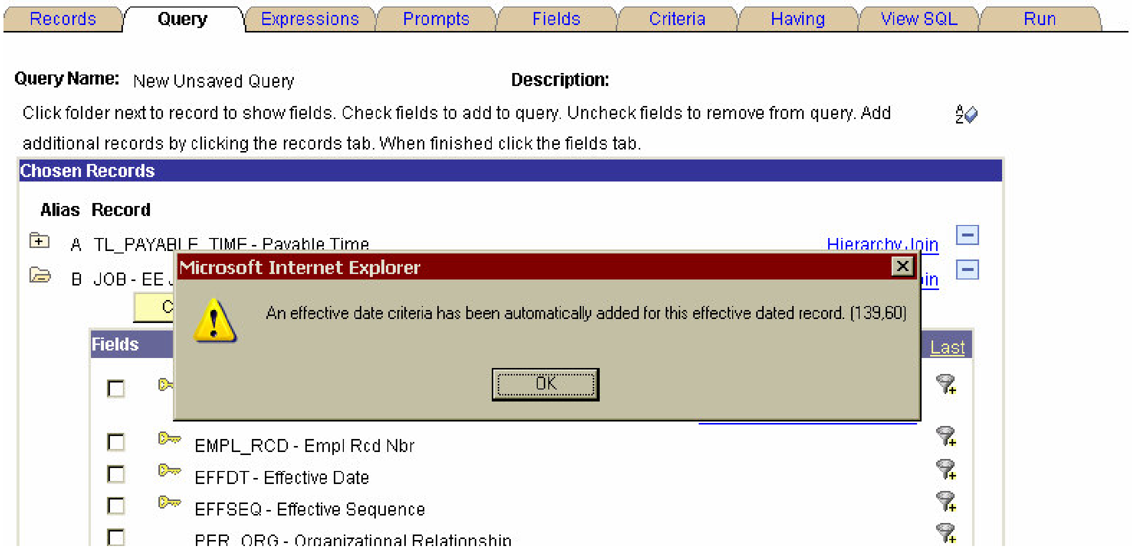

The Auto Join Criteria Page will come up and show you which fields have the ability to link the records together. Normally the default join criteria are appropriate and we can accept them as presented.

For this Query we will leave both boxes checked.

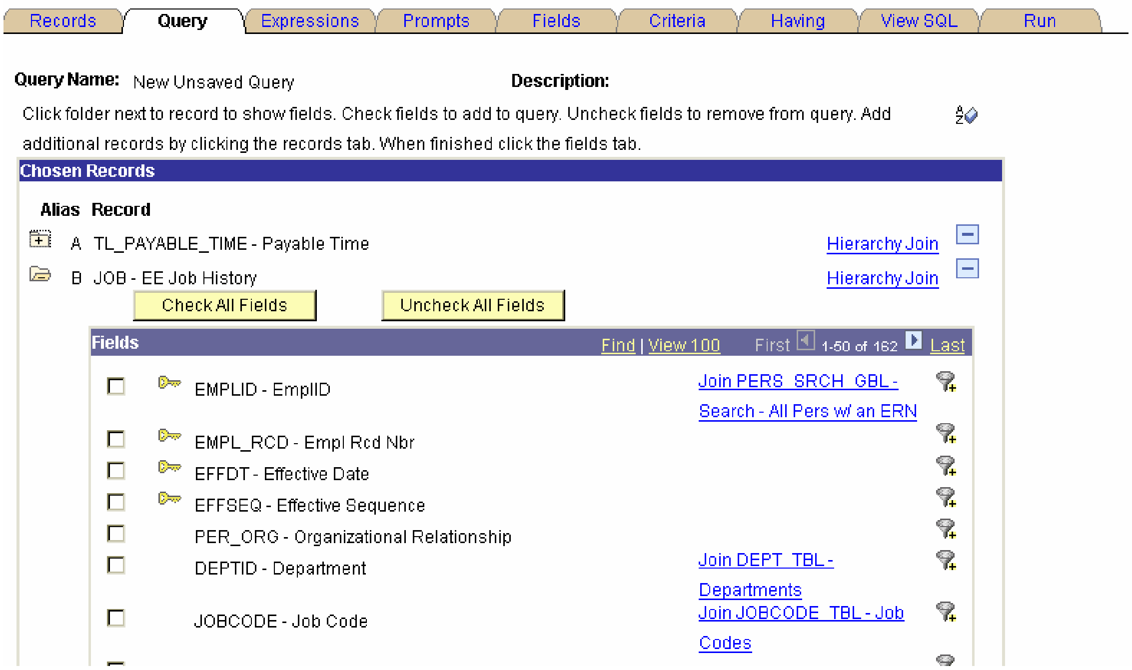



Click "Add Criteria"
A warning box will come up letting you know that an effective date criteria has been automatically set up for this record. This automatic feature happens on tables with historical data to help you limit the amount of data you will receive. For most queries, you will want to display the current data.

The JOB record holds information for all employees and all positions they have held. The automatic effective date criteria ensures that the query results only show the current job information for each employee. If you need to change this it can be done so later. For now, click OK.




When a new record is added the old record "collapses" into a folder. An individual folder may be expanded or collapsed by clicking on the Yellow-Folder icon (showing a '+' or '-' indicator under 'Alias Record').




Check the boxes: DEPTID – Department and EMPL_STATUS - Payroll Status

If we were to run the query as it is we would receive information for all employees (that you are able to view), including those no longer in City service and all TRCs. We need to set up criteria to limit the number of employees we are seeing, view the appropriate time period, and select only the TRCs that relate to FMLA.

First we will limit the information to Active Employees.

Click on the funnel to the right of the EMPL_STATUS – Payroll Status.

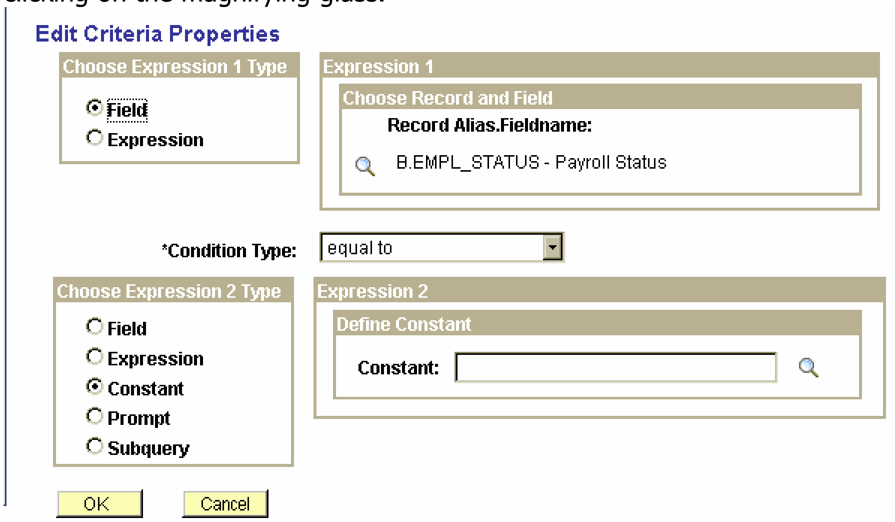

The Edit Criteria will come up as shown below.

The Expression 1 Box shows the field that you are adding the criteria to.

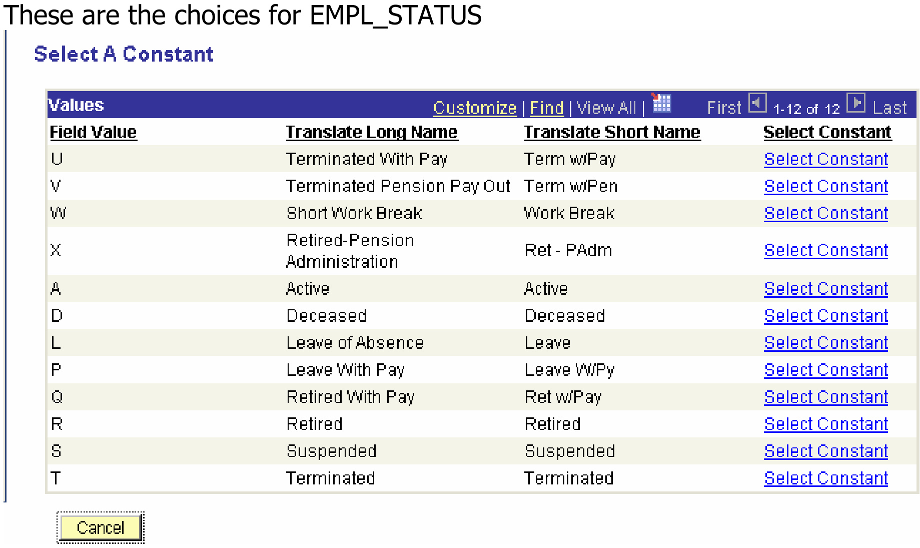
The Condition Type determines how much data you wish to retrieve.

In this case we only want Active Employees so we can leave this at "equal to"

The Expression 2 box is where you can define the Constant. You can look up possible choices by clicking on the magnifying glass.




These are the choices for EMPL_STATUS

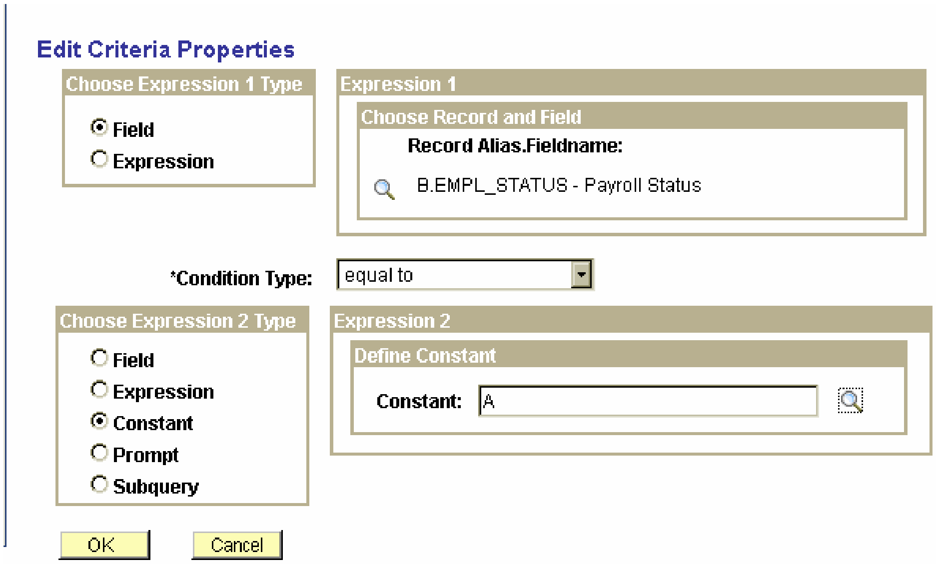

Select A Constant

Values Customize | Find | View All | First 1-12 of 12 Last

| Field Value | Translate Long Name | Translate Short Name | Select Constant |
|---|---|---|---|
| U | Terminated With Pay | Term w/Pay | Select Constant |
| V | Terminated Pension Pay Out | Term w/Pen | Select Constant |
| W | Short Work Break | Work Break | Select Constant |
| X | Retired-Pension Administration | Ret - PAdm | Select Constant |
| A | Active | Active | Select Constant |
| D | Deceased | Deceased | Select Constant |
| L | Leave of Absence | Leave | Select Constant |
| P | Leave With Pay | Leave W/Py | Select Constant |
| Q | Retired With Pay | Ret w/Pay | Select Constant |
| R | Retired | Retired | Select Constant |
| S | Suspended | Suspended | Select Constant |
| T | Terminated | Terminated | Select Constant |

Cancel

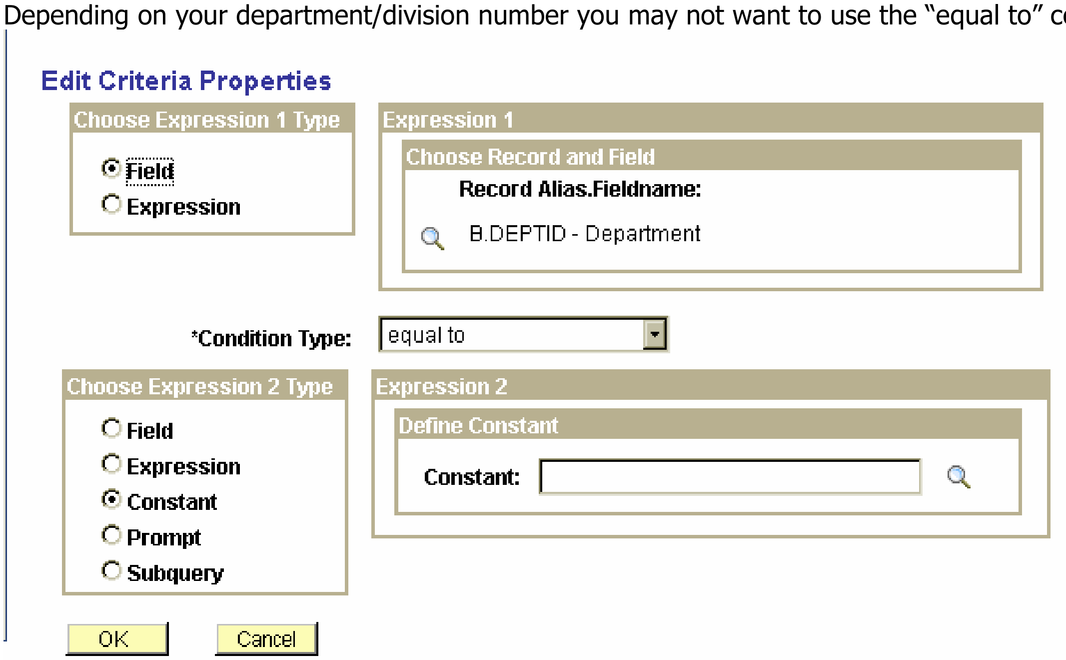
In this case we want Active employees or "A". Click "Select Constant" next to Active.




Click OK.

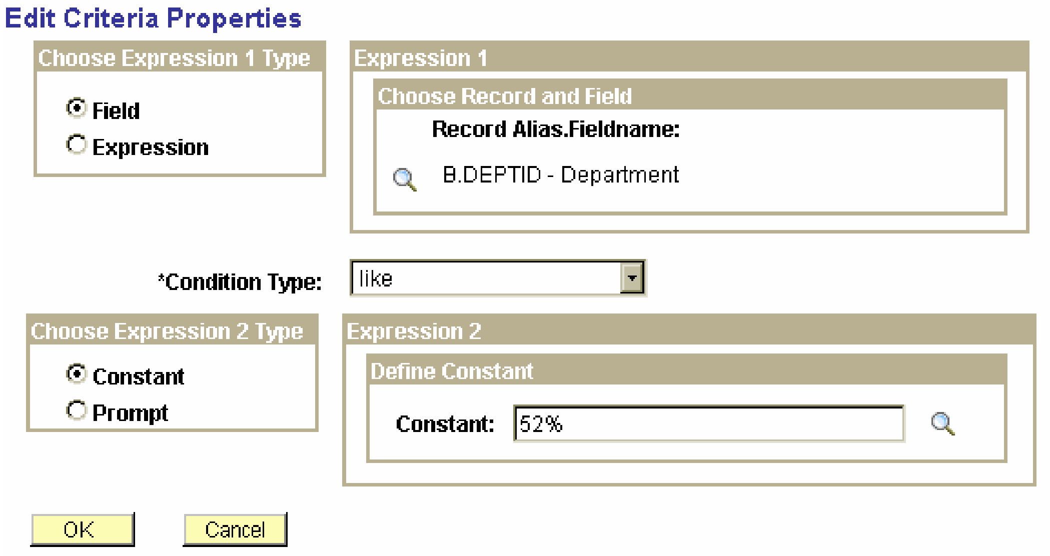
Next we need to limit the results to Departments/Divisions.
Click on the funnel to the right of the DEPTID – Department line.


Depending on your department/division number you may not want to use the "equal to" condition type.




EX. The Finance Department has department numbers ranging from 520100 to 520500. If I want to retrieve everyone in Finance I can use a criteria with a Wildcard. This will allow me to gather just those employees in Finance.

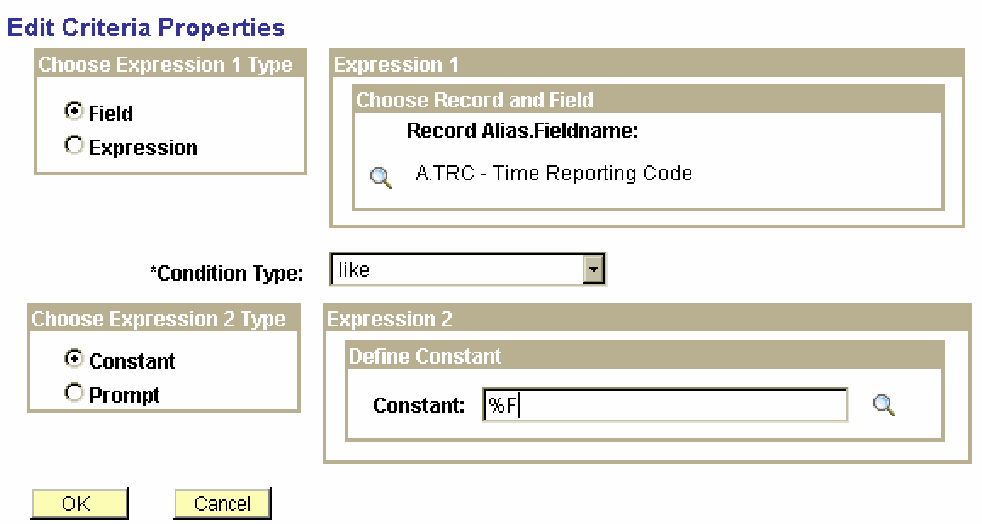
Change the Condition Type to "like" and then define the constant as the first 2 numbers of your department followed by the % symbol.  This will gather all employees that are in a department/division starting with 52.




Click OK.

Go back to the TL_PAYABLE_TIME record and click on the funnel next to TRC – Time Reporting Code.

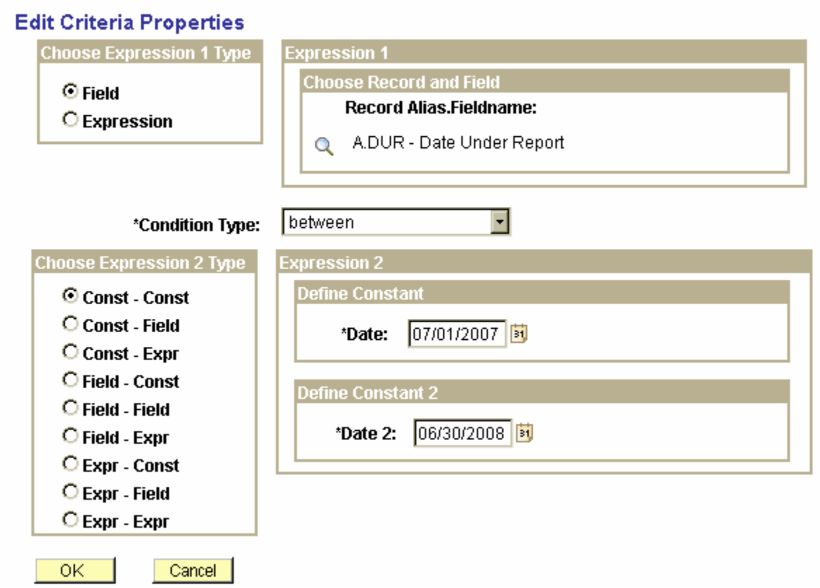

We want to set this criteria so that it grabs all TRCs that end with "F" (the designation for FMLA)



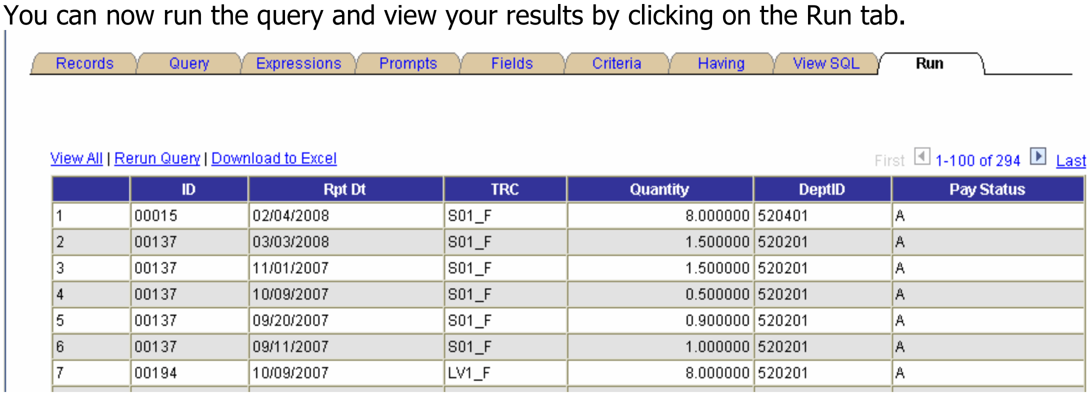

Click OK.

Go back to the TL_PAYABLE_TIME record and click on the Funnel next to DUR – Date Under Report

On this we want a range of dates. Change the Condition Type to "between" and then put in the range of dates. So I do not have to edit this query every time I run it, I set the time period for the entire fiscal year. This way I will only have to change the query every fiscal year.



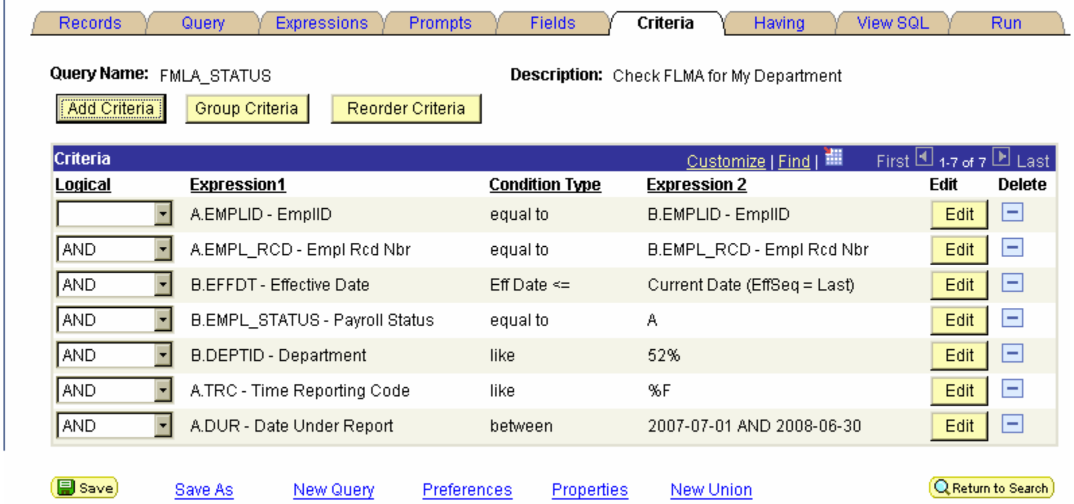

You can now run the query and view your results by clicking on the Run tab.




| | ID | Rpt Dt | TRC | Quantity | DeptID | Pay Status |
|---|---|---|---|---|---|---|
| 1 | 00015 | 02/04/2008 | S01_F | 8.000000 | 520401 | A |
| 2 | 00137 | 03/03/2008 | S01_F | 1.500000 | 520201 | A |
| 3 | 00137 | 11/01/2007 | S01_F | 1.500000 | 520201 | A |
| 4 | 00137 | 10/09/2007 | S01_F | 0.500000 | 520201 | A |
| 5 | 00137 | 09/20/2007 | S01_F | 0.900000 | 520201 | A |
| 6 | 00137 | 09/11/2007 | S01_F | 1.000000 | 520201 | A |
| 7 | 00194 | 10/09/2007 | LV1_F | 8.000000 | 520201 | A |

From here you can look over the results and make sure they show the data you are looking for. If not, you may need to change the criteria, add more fields, or even add another record with more fields.
If the data is what you want to see, you can "Download to Excel" and save the data there.

To change or add criteria you can go to the criteria tab. Here you will see all the criteria already created.

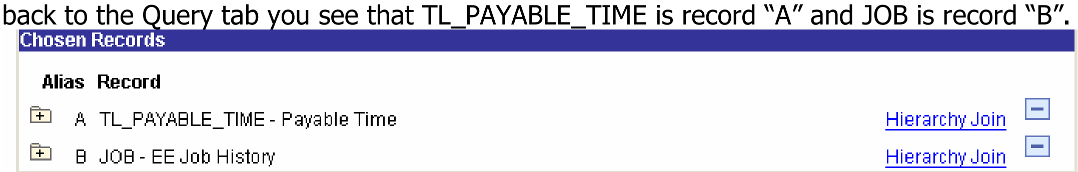



| Logical | Expression1 | Condition Type | Expression 2 | Edit | Delete |
|---|---|---|---|---|---|
| | A.EMPLID - EmplID | equal to | B.EMPLID - EmplID | Edit | |
| AND | A.EMPL_RCD - Empl Rcd Nbr | equal to | B.EMPL_RCD - Empl Rcd Nbr | Edit | |
| AND | B.EFFDT - Effective Date | Eff Date <= | Current Date (EffSeq = Last) | Edit | |
| AND | B.EMPL_STATUS - Payroll Status | equal to | A | Edit | |
| AND | B.DEPTID - Department | like | 52% | Edit | |
| AND | A.TRC - Time Reporting Code | like | %F | Edit | |
| AND | A.DUR - Date Under Report | between | 2007-07-01 AND 2008-06-30 | Edit | |

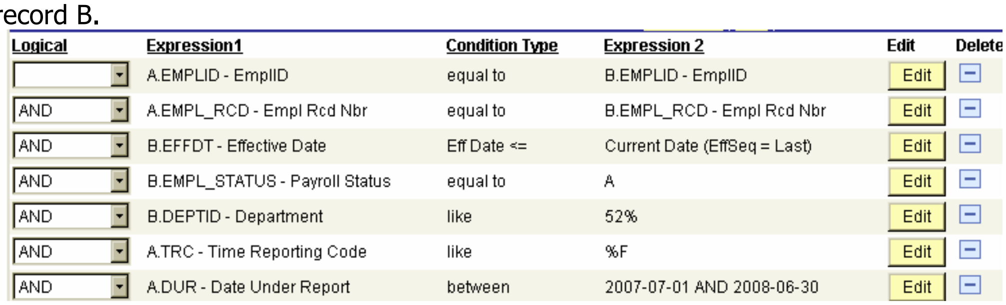
The first and second lines link the 2 records together.
The third line is the effective date of the JOB table.
The last 4 lines are the different criteria we set up earlier.

Each of these can be edited by clicking on the Edit button or deleted by clicking on the minus sign.

The letters at the beginning of each field tell you which record that data is being pulled from. If you go back to the Query tab you see that TL_PAYABLE_TIME is record "A" and JOB is record "B".

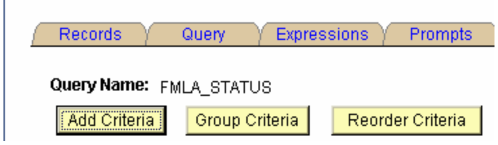



Looking back at the Criteria tab you can see that the EMPLID of record A is equal to the EMPLID of record B.

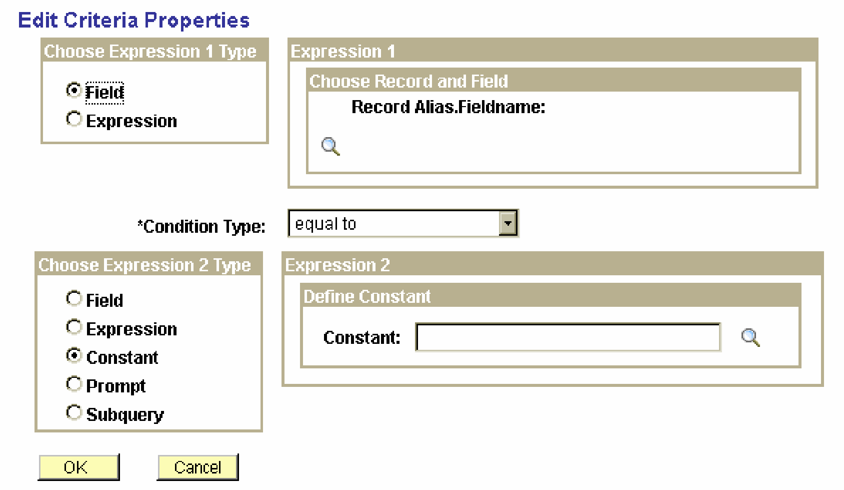


| Logical | Expression1 | Condition Type | Expression 2 | Edit | Delete |
|---|---|---|---|---|---|
| | A.EMPLID - EmplID | equal to | B.EMPLID - EmplID | Edit | |
| AND | A.EMPL_RCD - Empl Rcd Nbr | equal to | B.EMPL_RCD - Empl Rcd Nbr | Edit | |
| AND | B.EFFDT - Effective Date | Eff Date <= | Current Date (EffSeq = Last) | Edit | |
| AND | B.EMPL_STATUS - Payroll Status | equal to | A | Edit | |
| AND | B.DEPTID - Department | like | 52% | Edit | |
| AND | A.TRC - Time Reporting Code | like | %F | Edit | |
| AND | A.DUR - Date Under Report | between | 2007-07-01 AND 2008-06-30 | Edit | |

To add a criteria from this page click Add Criteria.



You will need to add a field in the Expression 1 box. Click on the Magnifying glass.



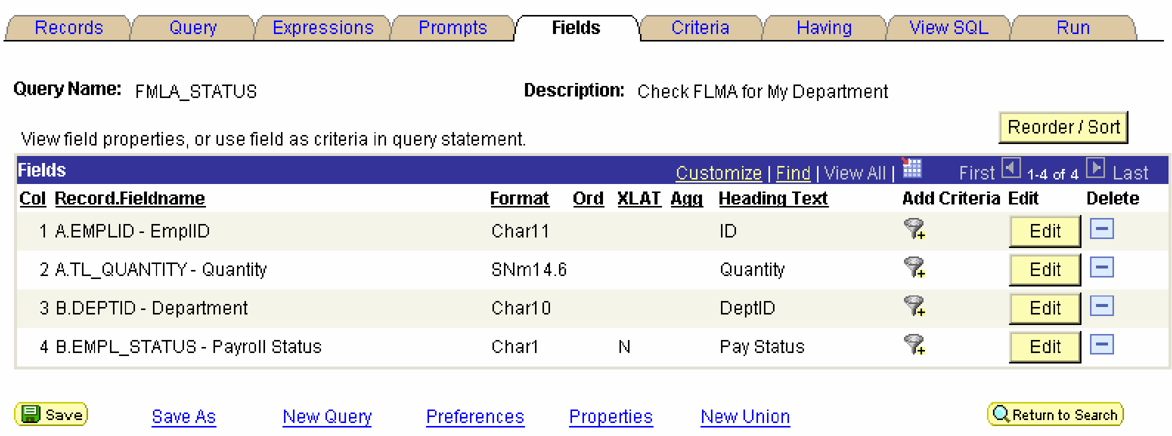

Select the field you need and it will show up in the Expression 1 box.


You can fill out the rest of the page the same as above.

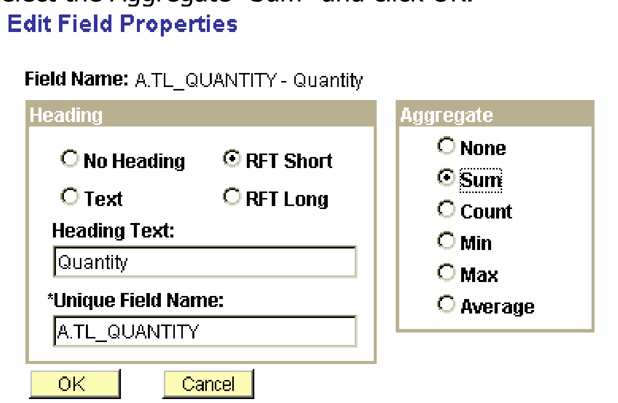
### Summing Fields

It is possible to sum the results of a field for each of the other fields displayed. In the query we have built so far, we are displaying the hours leave for each day for each TRC for each employee. If we want to display the total hours for each day for each employee we would delete the TRC field. If you want a sum of all FMLA used for each employee delete the DUR and TRC boxes. The detail is not displayed and the data is summarized for the remaining fields.

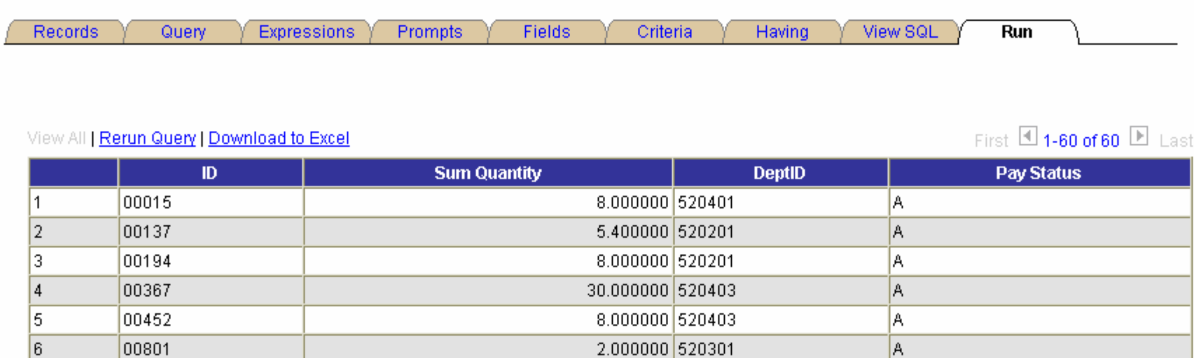
Go to the Fields tab and click the Edit button next to TL_QUANTITY.




Select the Aggregate "Sum" and click OK.




Run the Query.

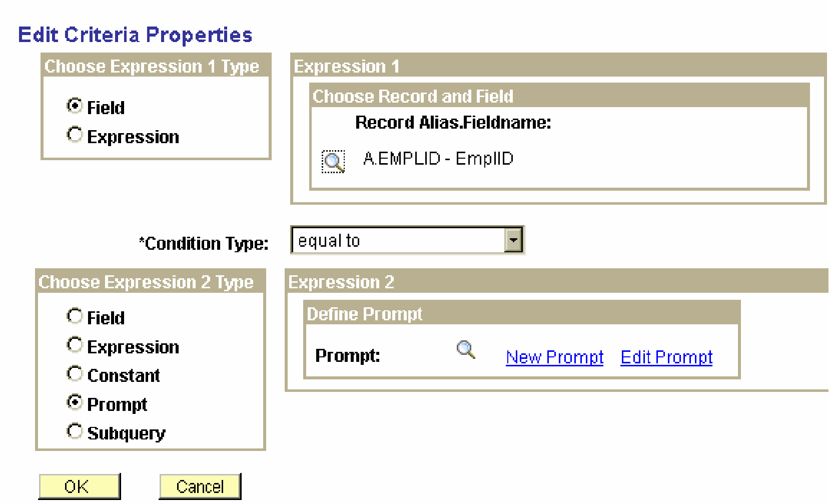



These results show the total number of FMLA hours for each active employee in Finance in FY08.

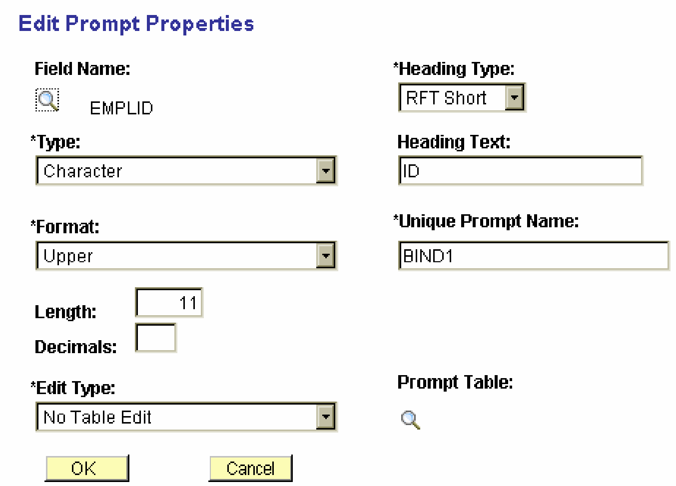
## Prompt Criteria

If you want to see results for only one employee you can add a Prompt.

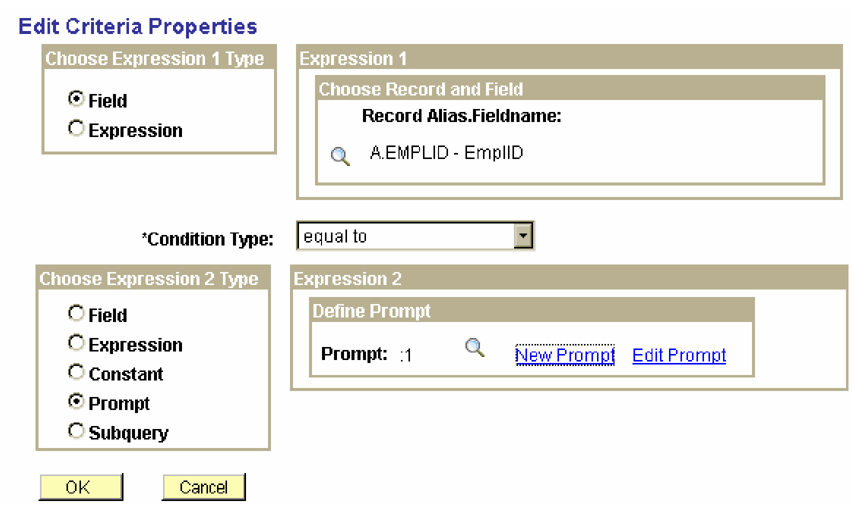
Go to the Criteria tab and click on Add Criteria.




In the Expression 1 box use the magnifying glass to select A.EMPLID. In the Choose Expression 2 Type, select "Prompt", Leave the Condition Type as "equal to". In the Expression 2 box select New Prompt.

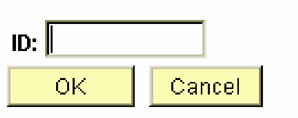



Confirm that the "Edit Type" is "No Table Edit". Click OK without making any changes.

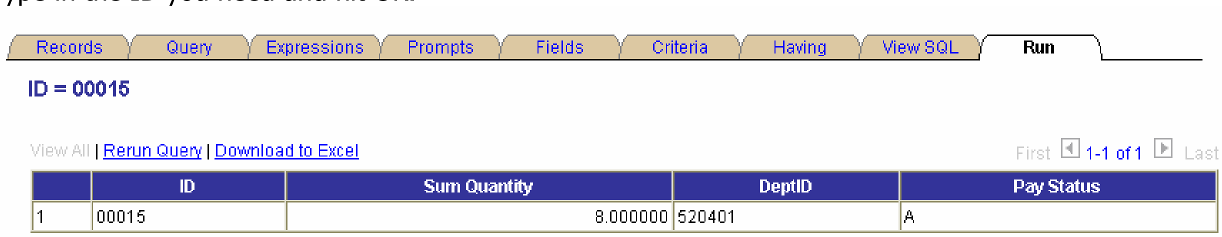



Click OK.

Run the query again.

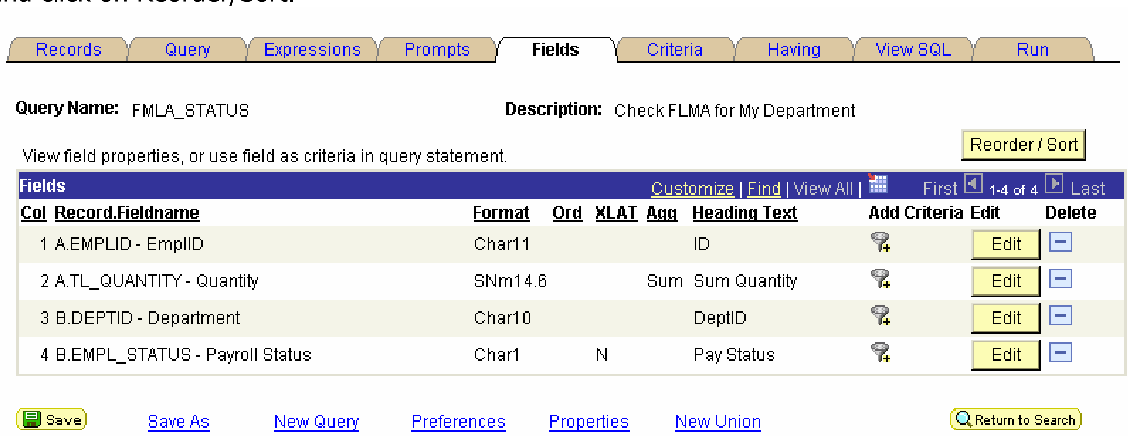



Type in the ID you need and hit OK.

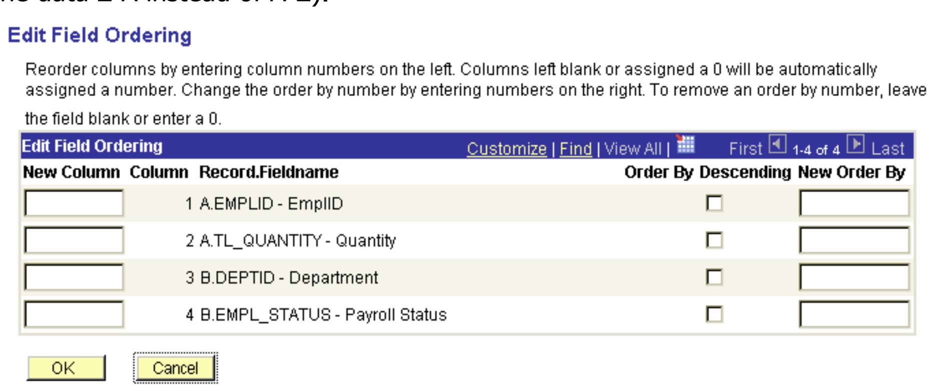


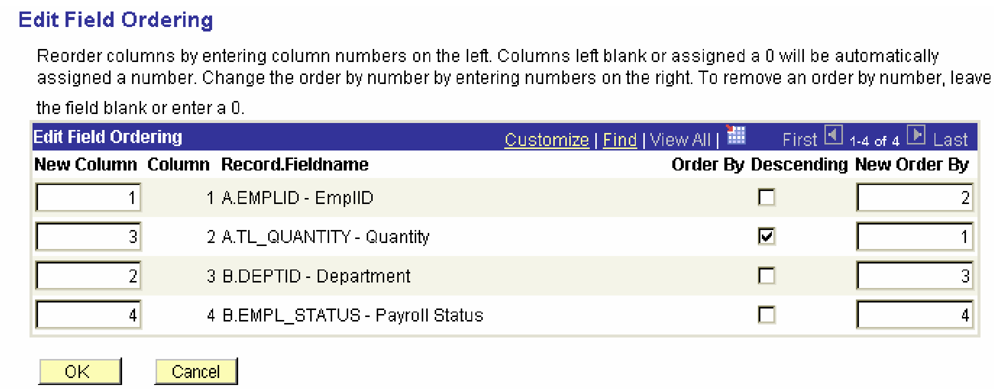

You will get results for just that employee.

If you do not like the way the columns are laid out or want to change the sort order go to the Fields tab and click on Reorder/Sort.




Put numbers in under "New Column" to determine your new layout. Use "New Order By" to change the Sort Order. If you want to change how the data sorts check the "Order By Descending" box (this will sort the data Z-A instead of A-Z).

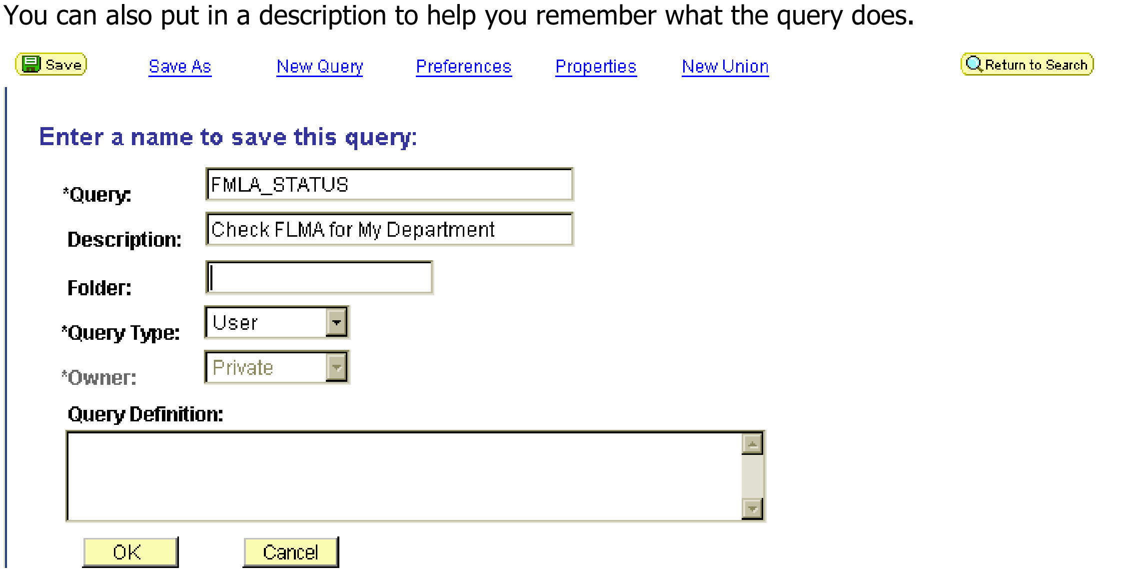





These changes will make the query order the data by TL_QUANTITY instead of by EMPLID and will put those employees with the most FMLA at the top of the list.

The query can be saved at any time by going to the bottom of any screen (except when on the Run tab) and clicking "Save".

When saving for the first time you will be asked to enter a name for the query (no spaces are allowed). You can also put in a description to help you remember what the query does.




Expressions are a way to modify the data in fields, perform mathematical functions on fields, join two fields together, or display only part of the data in the fields. Use of expressions is a more advanced function of query and will not be covered in this manual. If you need to use an expression in a query, please contact ISD or Payroll.

# APPENDIX:
## Common HR, PR and TL Tables v.8.3

Listed are the most commonly used query records in HR, PR and T&L. Not all records are listed, and not all fields within the records, but these should fulfill most of the needs in the field.

PERSONAL_DATA
- Employee ID
- Name
- Address
- Phone
- Gender
- Birth date

EMPLOYMENT
- Employee ID
- Hire Date (same as Original Hire Date)
- Service Date (the date on which leave accruals are based)
- Termination Date
- Last Increase Date
- Job Title
- Last Date Worked

JOB
- Employee ID
- Effective Date
- Department ID
- Job Code
- Position Number
- Employee Status
- Regular/Temp
- Full/Part Time
- Paygroup
- Step
- Step Entry Date
- Account Code
- Compensation Rate

PERSONAL _VW
- Employee ID
- Name

PAY_CHECK
- Employee ID
- Name
- Pay End Date
- Total Gross
- Total Taxes
- Total Deductions
- Net Pay

PAY_EARNINGS
- Employee ID
- Pay End Date
- Additional Pay Line Number
- Earnings Begin Date
- Earnings End Date

PAY_OTH_EARNS
- Pay End Date
- Additional Pay Line Number
- Earn Code
- Hours
- Earnings

TL_RPTD_TIME
- Employee ID
- Date under Report
- Time Reporting Code
- Quantity
- PC Business Unit
- Project ID
- Account Code
- Resource Type
- Activity ID

TL_PAYABLE_TIME
- Employee ID
- Date under Report
- Time Reporting Code
- Quantity
- Labor Distributed Amount
- Payable Status
- Frozen Date
- Approval Date/time Stamp
- PC Business Unit
- Project ID
- Account Code
- Resource Type
- Activity ID

TL_EMPL_DATA
- Employee ID
- Effective Date
- Time Reporter Status
- Time Reporting Template
- Workgroup
- Taskgroup
- Task Profile ID

TL_GROUP_DTL
- Group ID
- Employee ID

TL_NAME_VW
- Employee ID
- Name

TL_TASKGRP_TBL
- Taskgroup
- Effective Date
- Effective Status
- Task Profile ID
- Description
- Elapsed Reporting Template

TL_TSKPRF_DETL
- Taskgroup
- Task Profile ID
- Effective Date
- Allocation Percent
- PC Business Unit
- Project ID
- Account Code
- Resource Type
- Activity ID

Z_EMPL_DATA
- Employee ID
- Perm Status Date
- Pension Date
- Position Number
- Date Next Increase
- Date Next Evaluation

Z_PR_GL_REPORT – This table is a good summary, by pay period, of employee costs including fringe
- Employee ID
- Name
- CFTI Record Type
- Earn Code
- Account Code
- GL Account
- PC Business Unit
- Project ID
- Activity
- Distributed Amount
- Hours